



# YOUR WILL CLIENT QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of information our Firm would require upon confirmation of your appointment are set out below:

## PART A: YOU AND YOUR FAMILY

### 1. YOUR DETAILS

|                       |
|-----------------------|
| Forenames_____        |
| Surnames_____         |
| Address_____          |
| _____                 |
| _____                 |
| Telephone Number_____ |
| Date of Birth_____    |
| Occupation_____       |

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

|       |
|-------|
| _____ |
| _____ |
| _____ |
| _____ |

### 2. YOUR HUSBAND/WIFE/PARTNER

|                    |
|--------------------|
| Forenames_____     |
| Surname_____       |
| Date of Birth_____ |
| Occupation_____    |

### 3. MARRIAGE/PARTNERSHIP DETAILS

- (a) Year of marriage
- (b) Please tick this box if you are not married to your partner
- (c) Please tick this box if you are intending to marry/re-marry in the near future
- (d) Has either of you been married before? Yes  No

### 4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP)

- full names, dates of birth, and addresses if different from yours

|                    |
|--------------------|
| (a) Name_____      |
| Date of Birth_____ |
| Gender_____        |
| Address_____       |
| _____              |
| (b) Name_____      |
| Date of Birth_____ |
| Gender_____        |
| Address_____       |
| _____              |
| (c) Name_____      |
| Date of Birth_____ |
| Gender_____        |
| Address_____       |
| _____              |
| (d) Name_____      |
| Date of Birth_____ |
| Gender_____        |
| Address_____       |
| _____              |

**5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER FROM PREVIOUS MARRIAGES OR RELATIONSHIPS**  
- full names, dates of birth and address if different from yours

(a) Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Gender \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

(b) Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Gender \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

(c) Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Gender \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

**Please note:**

Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children. Children excluded from benefits under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

**PART B - YOUR HOME AND OTHER ASSETS**

**6. Your Home - is your home:**

(a) Owned.

- (i) in your name alone? Yes  No
- (ii) in joint names with your husband/wife/partner? Yes  No
- (iii) in the name of your husband/wife/partner alone? Yes  No
- (b) rented? Yes  No
- (c) others e.g. provided by a relative? Yes  No

**7. If your answer was (c) please give more details:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**8. Do You Have A Business?**

Yes  No

if yes: - state the type of business

\_\_\_\_\_  
\_\_\_\_\_

Is it a (tick box):

Company  Partnership  In Your Sole Name

**9. Your Main Assets**

Please list your other main assets below and give approximate values: -

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**10. Joint Assets**

Do you have any jointly owned assets? if yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please Note:** jointly owned assets generally pass to the joint owners automatically and cannot be given away by Will.

**11. Do You Have Any Assets Abroad?**

If yes, please give details:-

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PART C - FUNERAL, EXECUTORS, GUARDIANS**

**12. Funeral.**

You may specify in your Will if you wish to be:-

Buried  Cremated  No preference

**Please Note:**

You should make these wishes known to your immediate family as well and not rely on what is in your Will

**13. Executors.**

You must appoint executors to carry out the instruction in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners at our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

List below maximum of four chosen executors.

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Gender \_\_\_\_\_  
 Relationship \_\_\_\_\_

(b) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Gender \_\_\_\_\_  
 Relationship \_\_\_\_\_

(c) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Gender \_\_\_\_\_  
 Relationship \_\_\_\_\_

Would you like partners from our firm to act as your executor(s)? Yes  No

**14. Guardians.**

You may want to appoint one or two people to act as guardian(s) for your children under the age of 18. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_

**PART D - BENEFICIARIES**

The main part of your estate is called "the residue". (This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

**15. Cash Gifts.**

Please give the name(s) and address(es) of the beneficiary(ies) and the amount(s) to be given, with the age of anyone who is under 18.

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Amount \_\_\_\_\_  
 Relationship \_\_\_\_\_

(b) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Amount \_\_\_\_\_  
 Relationship \_\_\_\_\_

(b) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Amount \_\_\_\_\_  
 Relationship \_\_\_\_\_

(d) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Amount \_\_\_\_\_  
 Relationship \_\_\_\_\_

**16. Gifts Of Articles.**

Please give the name(s) and address(es) of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary(ies) will get nothing he or she will not be given the substituted item or the cash equivalent.

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Article \_\_\_\_\_

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Article \_\_\_\_\_

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Article \_\_\_\_\_

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_  
 Relationship \_\_\_\_\_  
 Article \_\_\_\_\_

**17. THE RESIDUE.**

This is all that you own except jointly owned property and the gifts made in questions 15 and 16

Please state below who is to receive the residue on your death and which is to your children, we may suggest a provision that if any of them dies before

you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's Share.

The following are the more common provisions made. if you wish to use one of these tick the appropriate box; if not, please go to question 18.

(a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally:

(b) Everything to my children, named at question 4 above, equally and any other children of mine:

You may choose the age at which your children will receive their entitlement(s). Insert choice from 18, 21 or 25 years in this box:

(c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organization(s) named in the box below. if not in equal shares, then show the share each is to take.

.....  
 .....  
 .....  
 .....  
 .....  
 .....

**18. IF NONE OF THE ABOVE CHOICE(S) IS APPROPRIATE**

Please set out below who is to receive the residue and, if more than one person or organization is involved, in what shares?

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Share \_\_\_\_\_

(b) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Share \_\_\_\_\_

Who is to benefit if the recipient dies before you?

(a) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Share \_\_\_\_\_

(b) Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Share \_\_\_\_\_



**GENERAL NOTES**

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one, Which takes a forthcoming marriage into account.
2. On divorce, gifts to Your husband/wife are cancelled, as well as his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
3. If you are not making any provision for your above polygamous husband/wife/partner, or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
4. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.